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Turkey

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Report Highlights:
Hazelnut production in Turkey is forecast to drop to 470,000 MT in MY 2009, compared to the record level at 780,000 MT in MY 2008. Due to the biannual cycle, pistachio production is expected to fall to 38,000 MT in MY 2009. Walnut production forecast is slightly increased to 88,000 MT and almond production of Turkey remained same at 16,000 MT in MY 2009.

Executive Summary:

Following a record crop in MY 2008, hazelnut production decreased sharply in MY 2009. Post has lowered its production forecast for MY 2009 from 650,000 MT to 470,000 MT as yields were well below MY 2008. MY 2009 exports are forecast at 425,000 MT. MY 2009 hazelnut quality appears to be much higher than in MY 2008.

Turkey exported 490,000 MT (inshell basis) of hazelnuts in MY2008 (officially 243,067 MT shelled basis), 15 percent more than in MY 2007. As prices fell, however, the total value of exports in MY 2008 was $1.1 billion, down from $1.6 billion in MY 2007.

The Ministry of Agriculture and Rural Affairs (MARA) announced a new hazelnut production and support policy in July 2009. The Turkish government says it plans to pay 2.6 billion TL to 290,000 producers between 2009 and 2012. The Turkish Grain Board (TMO) will no longer be responsible for procurement of hazelnuts in MY 2009. TMO currently holds 535,000 MT of hazelnut stocks. These stocks will be gradually crushed for oil. TMO plans to regulate markets in MY 2009 by using hazelnut stocks accrued from MY 2007 and MY 2008.

Pistachio production is estimated to be significantly lower in MY 2009 because this is an “off” year. Therefore, Post’s forecast for pistachio production is 38,000 MT, in line with trade estimates, whereas the Turkish Statistics Institute’s official forecast is 76,412 MT for MY 2009.

According to the Istanbul Exporters Union, pistachio exports surged in MY 2008, reaching 6,915 MT, which is 225% higher than MY 2007.

Post currently forecasts that MY 2009 walnut production will be about 88,000 MT, far below the official government forecast of 171,720 MT.

Turkey walnut imports, nearly all inshell, increased steadily and reached 25,989 MT in MY 2008. Shelled walnut exports, however, fell in MY 2008.

There is great interest in investing in walnut orchards in Turkey. Each year two million walnut seedlings are sold. Despite the interest in walnut orchards, growers’ lack of knowledge deters significant walnut production growth.

Post forecasts almond production at 16,000 MT in MY 2009. This year climate conditions in April and May were suitable for almond production.

Inshell almond imports of Turkey doubled in MY 2008 and reached 11,100 MT. There is a steady increase on shelled almond exports from Turkey.

Commodities:
Filberts, Inshell Basis

Production:

Turkey is the world's leading hazelnut producer, accounting for about 75 percent of global supply. Although hazelnuts have been grown in more than 48 provinces, production is concentrated along Turkey's Black Sea coast from Zonguldak to the Georgian border. Approximately 4 million people are directly or indirectly employed by the hazelnut sector in Turkey.

The Black Sea region is divided into three distinct growing areas: (1) the hilly region from Ordu to Trabzon, centered around Giresun, which in a normal year produces about 55 percent of the crop, (2) the flatter, mixed farming region west of Ordu to Samsun, which produces about 15 percent of the crop, and (3) the area west of Samsun, which produces the remaining 30 percent.

Hazelnuts require relatively little effort to cultivate and inputs are low.

Turkish hazelnuts usually ripen in August depending on the altitude of the orchard and climatic conditions. Hazelnuts are hand-picked and are dried in the sun.

Post has lowered the production forecast for MY 2009 from 650,000 MT to 470,000 MT. The government's official forecast number is 494,924 MT.

Heavy rain in July 2009, more than three times the July 2008 level, caused flood damage in several cities in the Black Sea region. The cumulative rainfall in the Black Sea region from October 2008 to August 2009 was above average.

Table 1: Hazelnut production area in major provinces (ha)

Turkey: Hazelnut production area in major provinces (ha)							
Year	**West Black Sea Region**	**Samsun**	**Ordu**	**Giresun**	**Trabzon**	**Other**	**Total**
2007	205,657	89,565	207,260	101,263	50,238	15,138	669,121
2008	192,835	90,291	212,566	101,350	52,964	-	650,006
2009F	172,196	88,341	212,566	101,727	59,000	19,513	653,343

Source: Ordu CME

Hazelnut yield and production both reached record levels in MY 2008. Yields in the Western Black Sea region yield were 1.4 MT/ha in MY 2008 and record high yields of 1.2 MT/ha were seen in the Eastern Black Sea region. Hazelnut yields in MY 2009 are difficult to forecast but the Western Black Sea region is currently expected to produce 130,000-160,000 MT and the Eastern Black Sea region is expected to produce 300,000-320,000 MT in MY 2009, on an area of 600-650,000 hectares.

Table 2: Turkey: Hazelnut yield

Turkey: Hazelnut yield			
YEAR	**AREA (Ha)**	**QUANTITY(Ton)**	**YIELD (kg/Ha)**
2007	669,121	498,712	75
2008 (Estimate)	650,006	804,546	124
2009 (Forecast)	653,343	462,003	70

Source:FISKOBIRLIK

In MY 2008, hazelnut quality was a concern especially at higher altitudes. In contrast, MY 2009 kernels reportedly better fill the shell. MY 2009 moisture content is less than in MY 2008, reducing aflatoxin problems.

The size of nuts produced in the MY 2009 hazelnut crop is much better than in MY 2008. Nuts of 9-11 mm are 5%, 11-13 mm are 40%, 13-15 mm are 50% and nuts above 15 mm are 5% of the total production.

Table 3: Official Turkish government hazelnut production forecast

Turkey: Official Turkish government hazelnut production forecast			
Provinces	**My 2007 (MT/in shell)**	**MY 2008 (MT/in shell)**	**MY 2009 (MT/in shell)**
Giresun	64,131	139,764	76,273
Ordu	140,300	210,583	91,758
Samsun	37,714	115,706	71,656
Trabzon	42,491	74,307	36,307
Sinop	1,758	1,615	1,847
Rize	1,322	1,408	2,147
Artvin	7,821	8,350	11,572
Sub-Total	295,537	551,733	291,560
Düzce+Bolu	71,213	90,972	72,689
Sakarya	88,295	115,262	84,012
Zonguldak	21,457	24,736	24,079
Kocaeli	14,659	13,595	14,409
Kastamonu	4,519	5,396	4,721
Bartın	3,082	2,852	3,455
Sub-Total	203,225	252,813	203,365
TOTAL	**498,762**	**804,546**	**494,924**

Source: Ministry of Agriculture, Forestry and Fisheries

Consumption:

Actual domestic hazelnut consumption in MY 2009 is projected to be about the same as MY 2008, which was around 100,000 MT.

Table 4: PSD Table for Hazelnuts

	2007 Revision			2008 Estimate			2009 Forecast		
	2007/2008			2008/2009			2009/2010		
	Market Year Begin: Sep 2007			Market Year Begin: Sep 2008			Market Year Begin: Sep 2009		
Basis Filberts, Inshell Turkey	USDA Official Data		Old Post	USDA Official Data		Old Post	USDA Official Data		Sep
	USDA Official Data		Data			Data			Data
Area Planted (ha)	0	0	630,000	0	0	690,000			690,000

Area Harvested (ha)	0	0	600,000	0	0	660,000			660,000
Bearing Trees (1,000 trees)	330,000	330,000	330,000	340,000	340,000	340,000			340,000
Non-Bearing Trees (1,000 trees)	18,000	18,000	18,000	17,000	17,000	17,000			17,000
Total Trees (1,000 trees)	348,000	348,000	348,000	357,000	357,000	357,000			357,000
Beginning Stocks (MT)	300,000	300,000	300,000	320,000	320,000	335,000			525,000
Production (MT)	550,000	550,000	550,000	780,000	780,000	780,000			470,000
Imports (MT)	0	0	0	0	0	0			0
Total Supply (MT)	850,000	850,000	850,000	1,100,000	1,100,000	1,115,000			995,000
Exports (MT)	450,000	450,000	415,000	500,000	550,000	490,000			425,000
Domestic Consumption (MT)	80,000	80,000	100,000	150,000	100,000	100,000			100,000
Ending Stocks (MT)	320,000	320,000	335,000	450,000	450,000	525,000			470,000
Total Distribution (MT)	850,000	850,000	850,000	1,100,000	1,100,000	1,115,000			995,000

Currently, there are 180 shelling plants in Turkey with an internal capacity of 1,800,000 tons per year and 40 processing plants with an internal capacity of 350,000 tons per year.

Hazelnut procurement by TMO started on September 02, 2008 and ended on March 5, 2009. TMO procured a total of 368,000 MT hazelnuts in MY 2008. Of this total, 366,000 MT were from producers and 1,796 MT were from FISKOBIRLIK. Also, 291,000 MT of these purchase were the Levant variety, 67,000 MT were the Giresun variety and 10,000 MT were pointed. (See **Stocks**)

TMO stopped selling inshell hazelnuts on August 14, 2009 because of the start of the new harvest season. TMO sold 44,591 MT of inshell hazelnuts in CY 2008 and 44,470 MT of inshell hazelnuts so far in CY 2009. TMO also sold 5,186 MT of shelled hazelnuts from MY 2006 stocks. TMO has started selling hazelnuts either to wholesalers or directly to the consumer through their own outlets.

Table 5: TMO hazelnut procurement

Turkey: Quantity of hazelnuts procured by TMO					
YEAR	**2005**	**2006**	**2007**	**2008**	**TOTAL**
QUANTITY (MT)	40,742	189,120	95,641	368,035	693,538

Trade:

To help dispose of its surplus, TMO is selling packed, roasted hazelnuts directly to consumers at a price of 8 YTL/kg. The current retail price for shelled roasted hazelnuts in Ankara is about YTL 18 (about USD12) per kilogram.

In MY 2008, the market price expectation was $4,000/MT (FOB) but because of TMO intervention, prices rose to $5,000/MT (FOB). Recent export prices are shown below.

Table 6: TMO Hazelnut export price

Turkey: Average TMO hazelnut export price		
TYPE OF HAZELNUT	AVERAGE EXPORT PRICE IN JULY	
	MY 2008 $US/ 100KG (quintal)	MY 2007 $US/ 100KG (quintal)
Standard hazelnut (Inshell)	573	595
Whole processed hazelnut	592	786
Chopped/diced kernels-sliced hazelnuts	523	657
Hazelnut flour/meals-hazelnut cream	355	543

Source: Black Sea Exporters Union

Although Turkey exported more hazelnuts in MY 2008 than in MY 2007, the value of exports dropped to US$ 1.1 billion in MY 2008 from US$ 1.6 billion in MY 2007. Total hazelnut export value in January-August of 2009 fell 31% from $805 million in 2008 to $555 million in 2009.

Due to a smaller crop, MY 2009 hazelnut exports are forecast at 425,000 MT. This is less than MY 2008 levels.

Table 7: Hazelnut exports (shelled and inshell)

Turkey: Hazelnut exports (shelled and inshell)		
Year	EXPORTS (million $)	EXPORTS (MT)
MY 2006	771	155,436
MY 2007	877	118,135
MY 2008	712	147,787

Source: TUIK

Table 8: Total hazelnut exports (including processed nuts)

Turkey: Total hazelnut exports (including processed nuts)		
Year	EXPORT (million $)	EXPORT (MT)
MY 2006	1,262	248,664
MY 2007	1,609	211,006
MY 2008	1,164	243,067

Source: TUIK

Almost 79 percent of total Turkish hazelnut exports are sent to the EU. Italy is the leading importer of processed and unprocessed Turkish hazelnuts with a share of 24 percent of the total, followed by Germany, France, Belgium, Switzerland, Austria and the Netherlands.

Turkey exported 243,067 MT of hazelnuts (converted to shelled hazelnut basis) in MY 2008. In MY 2007, Turkey exported 211,006 MT. Due to the record level of production in MY 2008, Turkey exported more hazelnuts than in MY 2007. The price of hazelnuts on the world export market dropped in MY 2008 as shown on the table below.

Table 9: Turkey: Major hazelnut and processed hazelnut export destinations

Turkey: Major hazelnut and processed hazelnut export destinations				
COUNTRIES	VALUE $ 1000		**Change**	**Share**
	MY 2007	**MY 2008**	**(%)**	**(%)**
Germany	435,641	280,894	-35.5	24.1
Italy	332,948	285,775	-14.2	24.6
France	145,978	89,251	-38.9	7.7
Belgium	74,036	52,116	-29.6	4.5
Switzerland	61,485	48,895	-20.5	4.2
Holland	48,886	37,356	-23.6	3.2
Austria	54,639	38,437	-29.7	3.3
Russian Federation	58,075	35,330	-39.2	3.0
England	38.591	26,476	-31.4	2.3
Poland	43,833	28,225	-35.6	2.4
TOTAL TOP 10 COUNTRIES	**1,294,113**	**922,755**	**-28.7**	**79.3**
OTHERS	314,807	241,222	-23.4	20.7
TOTAL	**1,608,920**	**1,163,977**	**-27.7**	**100.0**

Source: TUIK

Stocks:

As production has increased, the supply of hazelnuts has exceeded consumption and exports for several years and as a result stocks have soared. Since 2006 TMO has been forced to purchase surplus product. Post estimates MY 2008 ending stocks at 525,000 MT, more than the entire MY 2009 production forecast. Nearly all of these stocks are owned by TMO.

TMO currently has 515,355 MT of hazelnut stocks. This has become a serious political problem, as the theoretical value of these stocks now exceeds $2 billion.

TMO states it will send MY 2006 crop hazelnuts to crushers for production of hazelnut oil. MY 2007 and MY 2008 hazelnut stocks will be used as a tool to regulate the market in MY 2009

Table 10: TMO Hazelnut stocks

Turkey: TMO hazelnut stocks				
BRANCH	**2006**	**2007**	**2008**	**TOTAL**
AKCAKOCA	29,293	34,229	149,704	213,226
SAMSUN	20,789	6,674	25,903	53,366
ORDU	26,478	26,670	49,242	102,389
GIRESUN	22,409	6,169	63.995	92,573
TRABZON	14,294	6,847	32,659	53,800
TOTAL	**113,263**	**80,590**	**321,502**	**515,355**

Source:TMO

Policy:

In November 2001 the government published a list of approved hazelnut-producing provinces (table, below) and banned planting of new hazelnut orchards in provinces not listed, as well as on certain classes of land. However, the policy was not effective in controlling hazelnut production in Turkey.

Table 11: Approved hazelnut producer provinces

Turkey: Approved hazelnut producing provinces		
Number	**Province**	**Towns**
1	Artvin	Borçka and Arhavi
2	Duzce	Akçakoca, Cumayeri, Gölyaka, Çilimli, Gümüşova and Yığılca
3	Giresun	Merkez, Bulancak, Keşap, Tirebolu, Görele, Eynesil, Espiye, Dereli, Çanakçı, Güce, Doğankent, Yağlıdere and Piraziz
4	Kastamonu	Abana, Bozkurt, Cide, Çatalzeytin and İnebolu
5	Kocaeli	Kandıra
6	Ordu	All towns
7	Rize	Ardeşen, Fındıklı and Pazar
8	Sakarya	Kocaali, Karasu, Akyazı and Hendek
9	Samsun	Çarşamba, Terme, Ayvacık and Salıpazarı
10	Sinop	Merkez, Ayancık, Türkeli, Erfelek, Gerze and Dikmen
11	Trabzon	All towns
12	Zonguldak	Alaplı and Ereğli
13	Bartin	Merkez, Amasra and Kurucaşile

Because of the financial problems caused by the previous policy's oversupply problems, the government changed its hazelnut policy in MY 2009 through a Cabinet decision titled, "Area-based income support to hazelnut producers and compensation payment to the producer who choose to produce alternative crops instead of hazelnut." This decision was published in the Official Gazette on July 15, 2009. According to the decision, TMO will no longer be responsible for procurement of hazelnuts in MY 2009 and registered producers who carry a hazelnut producer card will receive 150 TL/da each year of direct income support in MY 2009, 2010 and 2011.

The target of the new policy is to uproot 167,646 ha of unlicensed plantings.The new support system offers compensation payments to producers if they uproot hazelnuts and plant alternative crops. Hazelnut producers who grow hazelnuts on the above mentioned provinces on first or second grade agricultural land, or on third grade agricultural land which has less than 6% slope and an area which is more than 750 meters in altitude, will receive compensation support payments during the 2009-2012 period. If farmers apply under this system in MY 2009, they will get 300 TL/da for the first year and 150 TL/da for each of the following two years. If they apply in MY 2010 they will get 300 TL/da for the first year and 150 TL/da for the second year. Finally, if they apply in MY 2011, producers will get 300 TL/da for that year only.

Table 12: Hazelnut Price Announced by TMO in MY 2008

Turkey: Hazelnut intervention price in MY 2008			
Types of Hazelnut	**September (YTL/KG)**	**October-November (YTL/KG)**	**December and After December (YTL/KG)**
GIRESUN	4	4.5	5
LEVANT	3.90	4.40	4.90
Others	3.70	4.20	4.70

Source: TMO

Through ten offices in the Black Sea region in MY 2008, TMO began purchasing hazelnuts from farmers on June 2, 2008 and finished on March 05, 2009. In that period, TMO bought 366,000 MT of hazelnuts from producers and 1,796 MT from FISKOBIRLIK (a hazelnut marketing co-operative).

The average cost of hazelnuts to TMO was 482 TL/MT in MY 2008. TMO sold 102,000 MT of hazelnuts from their stocks into the market in MY 2008. TMO's deficit from hazelnut sales was 130 million TL in MY 2008. Total TMO hazelnut procurement during MY 2006 to 2008 was 693,538 MT. TMO paid 2.8 billion TL for hazelnut procurement during this period. TMO hopes to earn 1.8 billion TL from hazelnut crushing. According to estimates, TMO's deficit from hazelnut procurement will be almost 1 billion TL in MY 2009. Because of the size of the deficit, the government allocated 1.268 billion TL to TMO in the first half of 2009.

According to Ministry of Agriculture data there are officially 322,000 hazelnut growers who produce hazelnuts on 640,000 ha. MARA estimates there are 176,000 ha of non-licensed hazelnut plantings in Turkey. These numbers are estimates published by MARA, but do not appear to add up. This demonstrates the lack of certainty of the actual area of hazelnut production in Turkey. The Ministry expects to pay 753 million TL to the producers who choose the seek benefits under the alternative crops program. MARA projects that under its new area-based payment scheme, it will have to pay 1.8 billion TL to 209,000 registered producers during the 2009 to 2012 period.

Table 13: Hazelnut area

Turkey: Hazelnut area					
YEAR	**AKCAKOCA REGION (HA)**	**ORDU REGION (HA)**	**GIRESUN REGION (HA)**	**TRABZON REGION (HA)**	**TOTAL (HA)**
2001	162,000	226,000	100,000	57,000	545,000
2002	164,600	228,400	100,000	57,000	550,000
2003	167,200	234,000	101,000	60,800	563,000
2004	169,600	237,700	102,600	62,100	572,000
2005	172,000	245,000	103,000	64,000	584,000

2006	181,300	266,000	105,800	66,900	620,000
2007	185,100	274,100	105,800	67,000	632,000
2008	188,200	277,800	106,000	68,000	640,000

Source: MARA

Separate research, conducted by the Hazelnut Promotion Agency and Agricultural Research Institute, which used remote sensing/GIS to determine the area devoted to hazelnut production determined that there are 691,972 ha of hazelnut plantings in Turkey, of which 25.7% are unlicensed. These numbers differ from MARA numbers due to different methodologies and it is not known which are more accurate.

Table 14: Licensed and unlicensed hazelnut area

Turkey: Licensed and unlicensed hazelnut area			
Provinces	**LICENSED HAZELNUT AREA (ha)**	**UNLICENSED HAZELNUT AREA (ha)**	**TOTAL HAZELNUT AREA (ha)**
Ordu	159,962	66,940	226,902
Giresun	102,326	15,474	117,800
Samsun	51,773	45,574	97,347
Trabzon	51,208	7,828	59,036
Duzce	46,754	12,124	58,878
Sakarya	54,031	17,740	71,771
Zonguldak	20,073	1,966	22,039
Sub-Total	486,127	167,646	653,773
Others	-	-	38,199
Total			691,972

Source: Hazelnut Promotion Agency and Agricultural Research Institute

Marketing:

Turkey concentrates its foreign market promotion efforts in Japan, China, the United States, India and Russia. Turkey is also making efforts to shift its export product mix towards processed products. Most exporters are represented by the Turkish Exporters' Union operating under the Foreign Trade Undersecretariat. Members of the Exporters' Union are mostly private traders and provide their own operating capital. There are two hazelnut exporters' unions; the largest one is the Black Sea Exporters Union, which is located in Giresun, and the other one is the Istanbul Hazelnut and Products Exporters' Union.

The Hazelnut Promotion Group (FTG) is a group that conducts market promotion both domestically and overseas. It has ten members: one from the Foreign Trade Undersecretariat and eight appointed by the boards of directors of the two exporters unions. FTG has targeted its activities towards the U.S. and domestic markets since its establishment in 1997. It also began advertising and promotion activities in Japan in 2000 and in the People's Republic of China in 2001. Activities were then extended in 2005 to include India, and have recently been extended to the Russian Federation.

FTG organized a course for bakery and cake producers in cooperation with Federation of Japan Confectionary Associations (JFCA) in Japan in July, 2009. FTG is also active at the domestic market. For example FTG succeeded at getting a picture of hazelnuts on national lottery tickets.

FTG continues its efforts in the U.S. Market and attended the Summer Fancy Food Show 2009 in New York. One of China's biggest ice cream manufacturers, Meng Niu, signed a contract to use Turkish hazelnuts in ice cream manufacturing.

Commodities:
Pistachios, Inshell Basis

Production:

Because this is an "off" year in the natural cycle, pistachio production in MY 2009 is forecast to be less than half of MY 2008's record crop. Pistachio exports also are forecast to plunge in MY 2009 after reaching record levels in MY 2008.

There are substantial differences between official production data and traders' estimates. According to the Turkish Statistics Institute (TUIK), the MY 2008 crop was 120,113 MT and the official forecast for MY 2009 is 76,412 MT. Trade sources, however, say they expect output of 30,000-45,000 MT for MY 2009. Post forecasts MY 2009 pistachio production at 38,000 MT, of which the Siirt variety will be around 5,500 MT.

Table 1: Pistachio Production of Turkey (Official Data)

Turkey: Official Pistachio Production					
Year	**Area (HA)**	**Production (MT)**	**Fruit Bearing trees (1,000)**	**Non-Bearing trees (1,000)**	**Total trees (1,000)**
2006	241,467	110,000	28,264	18,462	46,726
2007	225,684	73,416	28,463	14,939	43,402
2008	253,713	120,113	28,668	14,033	42,700
2009F	N/A	76,412	N/A	N/A	N/A

Source: TUIK

The harvest season started in September and is expected to finish in late September. Pistachio production is highly cyclical and yields vary a great deal from year to year and between regions and orchards. Pistachios are mainly produced in the Southeastern Anatolia Region and the number of plantations continues to increase in this area, as pistachios are replacing olive trees in the rain-fed areas. Sanliurfa province now has more trees than its neighboring province of Gaziantep, the traditional growing area.

Most Turkish pistachios are the Gaziantep type, thinner and smaller than Iranian-type pistachios. Siirt pistachios, about 15 percent of the total production, are somewhere between Gaziantep and Iranian pistachios. The Siirt type yields are not only higher but fluctuate less than the Gaziantep type. In Turkey, quality is directly related to size: 90 nuts or fewer per 100 grams is considered first quality, 90-100 nuts are second quality, 100-120 nuts are third quality, and more than 120 nuts are fourth quality

At the moment traders are expecting a low yield for MY 2009 because of a drought in the early summer. Due to the off year cycle, the MY 2009 pistachio crop is expected to show higher quality than in M 2008. Early harvest reports quality is better than in MY 2008 but not as good as previously forecast.

Table: 2 Pistachio Plantings in Major Turkish Provinces

Turkey: Official Pistachio Plantings in Major Provinces						
Province	**Year**	**Area (HA)**	**Production (MT)**	**Fruit Bearing trees (1,000)**	**Non-Bearing trees (1,000)**	**Total number of trees (1,000)**
Gaziantep	2005	95,548	20,388	9,709	3,545	13,255
	2006	96,366	47,724	9,801	3,416	13,218
	2007	80,246	36,427	9,721	1,912	11,634
	2008	80,346	47,636	9,730	1,918	11,648
Sanliurfa	2005	770,69	18,993	9,881	5,214	15,095
	2006	770,69	42,158	9,881	5,214	15,095
	2007	770,69	13,586	10,176	4,969	15,145
	2008	77,542	45,163	10,379	4,926	15,305
Siirt	2005	26,783	2,175	725	4,488	5,213
	2006	27,256	2,472	824	4,517	5,341
	2007	28,459	2,438	871	3,675	4,546
	2008	27,450	5,205	920	3,121	4,042
Adiyaman	2005	266,42	2,900	3,463	2,172	5,636
	2006	26,641	2,912	3,474	2,161	5,636
	2007	23,973	8,680	3,331	1,740	5,071
	2008	23,773	7,686	3,331	1,665	4,998
Kahramanmaras	2005	4,400	5,26	1,042	920	1,962
	2006	3,500	5,184	1,067	884	1,951
	2007	5,200	3,227	1,060	863	1,923
	2008	5,600	3,367	1,037	855	1,892
TOTAL TURKEY	**2005**	**241,000**	**60,000**	**28,000**	**18,491**	**46,491**
	2006	**241,467**	**110,000**	**28,264**	**18,462**	**46,727**
	2007	**225,684**	**73,416**	**28,464**	**14,939**	**43,402**
	2008	**253,713**	**120,113**	**28,668**	**14,033**	**42,700**

Source: TUIK

GUNEYDOGUBIRLIK, the sales cooperative that procures pistachios along with other crops such as red lentils and red peppers, was founded in 1940 in Gaziantep with 13 cooperatives, 15,000 partners and hundreds of thousands of producers. Traders are the most active in the market at the moment instead of producers and they are increasing the price as they increase their stocks.

At the moment the price of dried in-shell pistachios is around 9 YTL/kg and prices are increasing day by day.

Consumption:

Pistachios are widely eaten as a snack food and used in the production of confectionary products, especially desserts and bakery products.

Currently, the retail price for high quality roasted in-shell pistachios, both Gaziantep and Siirt, are about YTL 24 (or about USD 15) per kilogram in Ankara. Low quality roasted pistachio price is 15 TL/kg.

Trade:

Turkey exports only a small portion of its production. Primary destinations are Italy, Syria, Belgium, Germany, U.S, Israel, Greece, Spain and Saudi Arabia.

Table 3: Pistachio importation and exportation (MY)

Turkey: Pistachio foreign trade					
PRODUCT	**YEAR**	**IMPORT ($)**	**IMPORT (KG)**	**EXPORT ($)**	***EXPORT (KG)***
Pistachio (INSHELL)	2006	1,049,097	83,650	13,062,251	1,165,866
	2007	643,083	49,427	12,312,792	827,662
	2008	1,046,510	117,000	39,821,355	4,376,239
PISTACHIO (PACKED >1 KG)	2006	518,591	74,370	6,873,518	930,427
	2007	123,390	7,538	6,945,195	644,094
	2008	116,557	12,679	8,537,670	1,060,582
PISTACHIO (ROASTED)	2006	N/A	N/A	7,921,003	1,307,591
	2007	N/A	N/A	7,387,301	657,484
	2008	N/A	N/A	8,096,215	921,281
TOTAL	2006	1,567,688	160,027	27,856,772	3,403,884
	2007	766,473	56,965	27,163,000	2,129,241
	2008	1,163,067	129,679	59,753,000	6,915,000

Pistachio exportation of Turkey in MY 2008 is announced by Istanbul Exporters Union at 6,915 MT which is 224.9% higher than MY 2007.

Due to record production, pistachio exports increased dramatically in MY 2008. Much of the increased exports went to Syria. Syria usually imports pistachio from Iran but due to the low level of production in Iran, Turkey supplied Syria. Pistachio exports to Syria are not only the result of domestic demand of Syria but also demand from other Arabic countries resold via Lebanon.

Table 4: Major market for Turkish Pistachio based on CY

Product	**Country**	**Export ($)**	
		CY 2007	**CY 2008**
Pistachio	Italy	8.684.817	7.460.887
	Germany	7.132.733	7.114.794

	Syria	8.640	5.459.951

Stocks:

Pistachio stocks vary considerably from year to year in line with cyclical production. High level of production resulted in high amount of stocks in MY 2008. In MY 2009, stocks level are expected to decrease. Traders are not eager to keep stocks when an "on year" is expected.

Policy:

The government stopped giving direct supports to pistachio farmers several years ago, and since 2004 GUNEYDOGUBIRLIK has not announced any procurement prices for pistachios.

There is, however, a government support of 300 TL/ha for the establishment of new orchards that are planted with certified seedlings.

There are no subsidies, taxes or other restrictions on pistachio exports but pistachio imports to Turkey are not allowed at any time of the year. There is evidence that Iranian pistachios enter Turkey and are exported labeled as Turkish product.

Marketing:

The Antep Pistachio Promotion Group was established in January, 2006. The Aegean, Southeast Anatolian and Istanbul Exporters Unions each have two members on the Board of Directors. Also the Undersecretariat of Foreign Trade names one member. The goal of group is to organize and manage research and marketing activities to increase the consumption and exportation of Antep pistachios.

The group participated to the following meetings in 2009

- ISM 2009 fair on 01-04 of February in Koln/Germany
- IFE International Food and Beverages Fair on 15-18 of March in London/UK

GUNEYDOGUBIRLIK, which is located in Gaziantep Province, is the only sales cooperative union for pistachios; this sales cooperative follows domestic and foreign trade issues, provides information, conducts market research, and sponsors promotional events.

Production, Supply and Demand Data Statistics:

PSD Table for Pistachios

PSD Pistachios, In shell Basis	2007 Revision			2008 Estimate			2009 Forecast		
	2007/2008			2008/2009			2009/2010		
	Market Year Begin: Sep 2007			Market Year Begin: Sep 2008			Market Year Begin: Sep 2009		
	USDA Official Data		Old Post Data	USDA Official Data		Old Post Data	USDA Official Data		Sep Data
Area Planted(HA)	0	0	0	0	0	0		0	0
Area Harvested (HA)	0	0	0	0	0	0		0	0

Bearing Trees (1000 TREES)	28,000	28,000	28,000	29,000	29,000	29,000		29,000	29,000
Non-Bearing Trees (1000 TREES)	15,000	15,000	15,000	14,000	14,000	14,000		14,000	14,000
Total Trees (1000 TREES)	43,000	43,000	43,000	43,000	43,000	43,000		43,000	43,000
Beginning Stocks (MT)	63,000	63,000	63,000	39,000	40,654	34,654		59,869	42,869
Production (MT)	40,000	40,000	40,000	85,000	85,000	85,000		38,000	38,000
Imports (MT)	0	57	57	0	130	130		90	90
Total Supply (MT)	103,000	103,057	103,057	124,000	125,784	119,784		97,959	80,959
Exports (MT)	5,500	3,403	3,403	6,000	6,915	6,915		3,400	3,000
Domestic Consumption (MT)	58,500	59,000	65,000	59,000	59,000	70,000		59,000	65,000
Ending Stocks (MT)	39,000	40,654	34,654	59,000	59,869	42,869		35,559	12,959
Total Distribution (MT)	103,000	103,057	103,057	124,000	125,784	119,784		97,959	80,959

PSD production estimates are based on in shelled nuts with a conversion factor of 1:2

Commodities:
Walnuts, Inshell Basis

Production:
This has been a good year for walnut production, and post forecasts MY 2009 production will reach 88,000 MT, higher than estimated MY 2008 production of 80,000 MT but much lower than the official government forecast of 171,720 MT. Note that official government estimates (See Table) appear much higher than estimates given by traders and producers. One hypothesis is that the official statistics include “backyard” production that never enters commercial channels

As demand has risen and prices become favorable, walnut production has been increasing with a growing number of orchards and better varieties. There are festivals around Turkey to promote walnut production and consumption. These include the Bitlis Province Adilcevaz Walnut Festival, the Kirsehir Province Kaman Walnut Festival, the Tokat Province Niksar Walnut Festival and the Giresun Province Sebinkarahisar Walnut Festival. Walnuts grow throughout the country and increased demand and good prices have encouraged walnut cultivation in recent years. Major producer provinces are Karaman, Kastamonu, Hakkari, Bursa and Tokat.

The major problem for walnut producers in Turkey is low yields.

There is great need for improved varieties. Yalova Horticulture Research Institute, which is located in Yalova in the Marmara Region, is Turkey’s leading walnut research facility and developer of new varieties. Commercial production of the improved varieties developed by the institute has begun in Balikesir, Denizli, Bursa and Maras provinces.

Table 1: Walnut Area and Production

Turkey : Official Walnut Area and Production					
Year	**Area (HA)**	**Production (MT) Inshell Basis**	**Fruit Bearing Trees (1,000)**	**Non-Fruit Bearing Trees (1,000)**	**Total number of Trees (1,000)**
1995	NA	110,000	3,453,000	1,067,000	4,520,000
1996	NA	115,000	3,447,000	1,047,000	4,494,000
1997	NA	115,000	3,445,000	1,050,000	4,495,000
1998	NA	120,000	3,490,000	1,155,000	4,645,000
1999	NA	120,000	3,525,000	1,300,000	4,825,000
2000	NA	116,000	3,550,000	1,490,000	5,040,000
2001	NA	116,000	3,640,000	1,780,000	5,420,000
2002	NA	120,000	3,850,000	2,030,000	5,880,000
2003	NA	130,000	4,100,000	2,100,000	6,200,000
2004	NA	NA	NA	NA	NA
2005	197,000	150,000	4,535,000	2,245,000	6,780,000
2006	208,967	129,614	4,595,453	2,353,440	6,948,893
2007	286,797	172,572	4,926,985	2,788,405	7,715,390
2008	328,873	170,897	5,094,781	2,951,522	8,046,303
2009*	-	171,720	-	-	-

Source: Turkish Statistics Institute (TUIK) and Turkish Ministry of Agriculture
*Forecast by TUIK

Reportedly two million walnut seedlings were sold in Turkey in 2009, but there is a shortage of certified, standardized seedlings of improved walnut cultivars in Turkey.

Until 1970 walnuts had been propagated only by seeds and therefore until the last decade it was very difficult to find established orchards of standard cultivars. However the importance of propagation by grafting and budding is now understood and as a result orchards established of standard cultivars are becoming increasingly widespread. These standard walnut orchards are generally planted with cultivars selected in Turkey. The numbers of grafted saplings increased to 2 million units/year in year 2009 from 1.5 million units/year in 2005 up from 2,400 units/year in 1976.

Almost all walnut trees in Turkey are grown without the use of pesticides and chemical fertilizers. This explains why, in recent years in some areas, organic walnut production has become popular.

Consumption:

Walnut consumption has increased significantly in recent years. Per capita consumption, which was estimated earlier as 1.5 kilograms/year, is now estimated to be almost 2 kilograms. Consumption has increased due to perceived health benefits and the availability of inexpensive imported walnuts. The U.S. dollar’s weakness against the Turkish Lira in 2007 and 2008 also lowered import prices, thus increasing demand. As for domestic production, it is estimated that about half is consumed in the homes of the producers and the rest is marketed commercially.

Walnuts are commonly used in dessert production. Also, by combining walnuts with mulberries and grapes, special products such as *pestil* and *köme* are made. Walnuts also are used in ice cream and *halva* production, and in the dried fruit industry. The leaves and green shells are used as a pigment in Turkey.

Retail prices of shelled walnuts vary greatly because of large differences in quality. A kilogram of top quality domestically grown shelled walnuts is sold for TL 45 and lower quality walnuts may be sold for as low as TL 20/kg in retail stores in Ankara. Imported high quality shelled walnut price is TL 32/kg. Shelled walnut price was recorded at TL 16/kg at the Gaziantep commodity exchange in August, 2009.

Trade:

Generally Turkey imports inshell walnuts and exports shelled nuts.

Walnut imports, nearly all inshell, increased to 39,292 MT in MY 2008. Exports, nearly all shelled walnuts, dropped slightly in MY 2008 to 3,118 MT presumably due to the overall economic slowdown.

Table 2: Walnut importation and exportation (MY)

Turkey: Walnut Foreign Trade (MT Actual Basis)				
Product	**IMPORT ($)**	**IMPORT (MT)**	**EXPORT ($)**	**EXPORT (MT)**
Walnut (Inshell) 2006	14,259,029	8,148	13,914	*3.7*
Walnut (Inshell) 2007	26,118,886	15,419	1,784	*0.53*
Walnut (Inshell) 2008	32,550,911	21,427	31,156	16
Walnut (Shelled) 2006	32,951,657	6,869	3,566,857	*394*
Walnut (Shelled) 2007	56,568,739	9,955	13,324,088	*1,423*
Walnut (Shelled) 2008	40,310,851	7,146	11,068,010	1,241
TOTAL 2006	47,210,686	--	3,580,771	--
TOTAL 2007	82,687,625	--	13,325,872	--
TOTAL 2008	*72,861,762*	--	*11,099,166*	--

The Istanbul Exporters Union announced walnut exports in MY 2008 in terms of value is 17% lower than MY 2007.

Major walnut suppliers of Turkey are the United States and Ukraine. U.S. walnut exports to Turkey doubled in CY 2008 compared to CY 2007.

During January-June, 2009, Turkey imported 12,740 MT of inshell walnuts. In the same period of 2008, Turkey imported 8,879 MT of inshell walnut mostly from the United States.

Table 4: Major Walnut Suppliers to Turkey

Turkey: Major Walnut Suppliers, January-June, 2009			
	Partner Country	2009 (January-June)	
		$US	Quantity (MT)
Walnut (In shell)	World	23,516,141	12,740
	U.S.	16,087,839	8,703
	Chile	4,825,284	2,620
	Ukraine	1,073,575	590
	Moldova	152,575	278
	Uzbekistan	120,600	219
Walnut (Shelled)	World	20,016,501	3,517
	Bosnia-Herzegovina	4,338,633	754
	Ukraine	3,466,414	610
	Romania	2,924,745	526
	Moldova	2,545,720	449
	U.S	2,422,149	417

Source: TUIK

Stocks:

Data on walnut stocks is not available.

Policy:

There is a government support payment of 200 YTL/da (~$1,300 ha) for new orchard establishment for walnuts which have been produced from certified seedlings.

TUBITAK (The Scientific and Technological Research Council of Turkey) has a budget of 1,414,000 TL from 2007 to 2011 for a project to increase Turkey walnut production by 100,000 MT. Another ambitious project is targeted in Hakkari in the country's southeast corner, bordering Iran and Syria. In the following year 57,000 walnut seedlings expected to be planted in Zap River valley in Hakkari. The EU is funding a project in Giresun to increase organic walnut production.

Marketing:

Walnuts receive no government support for marketing and there are no producer associations or marketing cooperatives for walnuts in Turkey.

There are no subsidies, taxes or other restrictions on walnut exports.

Production, Supply and Demand Data Statistics:

PSD Table for Walnuts

Turkey:Walnuts, In shell Basis						
PSD WALNUT IN SHELL BASIS	2007 Revision		2008 Estimates		2009 Forecast	
	2007/2008		2008/2009		2009/2010	
	Market Year Begin: Sep 2007		Market Year Begin: Sep 2008		Market Year Begin: Sep 2009	
	USDA Official Data	Old Post	USDA Official Data	Old Post	USDA Official Data	Sep

			Data			Data			Data
Area Planted (HA)	0	0	0	0	0	0		0	0
Area Harvested (HA)	0	0	0	0	0	0		0	0
Bearing Trees (1000 TREES)	4,700	4,700	4,700	4,950	4,950	4,950		4,980	4,980
Non-Bearing Trees (1000 TREES)	2,400	2,400	2,400	2,500	2,500	2,500		2,700	2,700
Total Trees (1000 TREES)	7,100	7,100	7,100	7,450	7,450	7,450		7,680	7,680
Beginning Stocks (MT)	18,000	18,000	18,000	20,000	39,217	19,746		52,250	15,920
Production (MT)	90,000	90,000	90,000	85,000	85,000	85,000		88,000	88,000
Imports (MT)	18,000	40,304	40,304	18,000	35,807	39,292		33,000	40,000
Total Supply (MT)	126,000	148,304	148,304	123,000	160,024	144,038		173,250	143,920
Exports (MT)	1,000	4,087	3,558	400	2,774	3,118		3,000	3,000
Domestic Consumption (MT)	105,000	105,000	125,000	105,000	105,000	125,000		106,000	125,000
Ending Stocks (MT)	20,000	39,217	19,746	17,600	52,250	15,920		64,250	15,920
Total Distribution (MT)	126,000	148,304	148,304	123,000	160,024	144,038		173,250	143,920

PSD production estimates are based on inshell nuts with a conversion factor of 1:2.5

Commodities:
Almonds, Shelled Basis

Production:
Almonds were considered a minor crop and were not cultivated as a commercial crop in Turkey until recently. However, the situation has changed due to higher prices and local varieties have been improved through selection. MY 2007 production is estimated at 15,500 MT and MY 2008 production at 16,000 MT. This year climate conditions in April and May were suitable for almond production. Post forecasts almond production at 16,000 MT in MY 2009. Even though almonds are grown in most parts of the country, commercial production is concentrated in the Aegean, Marmara, and Mediterranean Regions.

Official production data is reported on an inshell basis.

Table 1: Almond Production in Turkey

Turkey: Almond production (Official, Inshell basis)					
Year	Area (HA)	Production (MT,	Fruit-Bearing	Non-Bearing	Total trees

		Inshell basis)	trees (1,000)	trees (1,000)	(1,000)
1999	85,260	43,000	3,620,000	590,000	4,210,000
2000	82,000	47,000	3,600,000	565,000	4,165,000
2001	77,700	42,000	3,575,000	545,000	4,120,000
2002	78,000	41,000	3,500,000	520,000	4,020,000
2003	78,000	41,000	3,475,000	520,000	3,995,000
2004	78,000	37,000	3,450,000	500,000	3,950,000
2005	82,000	45,000	3,400,000	543,000	3,943,000
2006	83,100	43,285	3,235,839	578,729	3,814,568
2007	99,505	50,753	3,517,332	1,014,251	4,531,583
2008	109,130	52,774	3,430,219	1,279,101	4,709,320

Source: TUIK

There is no special organization for almond producers. Almond orchard establishment is getting popular in Turkey. Some big companies have started to invest almond orchards in Turkey. TUKSIAD (Turkey Dried Fruits and Nuts Traders and Businessman Association) is actively promoting almond orchard establishments in Turkey. They established demonstration orchard in Denizli province. Due to the efforts of government and private sector, almond orchard area increased significantly in Denizli and Mugla provinces (Note shaded figures in following table).

Table 2: Major Almond Producing Provinces

Turkey: Major Almond Producing Provinces						
Provinces	**Year**	**Area (HA)**	**Production (MT) (Inshell basis)**	**Fruit Bearing trees (1,000)**	**Non-Fruit Bearing trees (1,000)**	**Total number of trees (1,000)**
Canakkale	2002	360	2,096	134,560	12,135	146,695
	2007	1,311	2,712	149,480	26,270	175,750
	2008	1,919	2,631	151,780	37,586	189,366
Denizli	2002	1,610	1,519	114,649	24,195	138,844
	2007	3,271	2,606	170,630	57,998	228,628
	2008	3,950	3,032	175,935	70,780	246,715
Mugla	2002	3,008	5,215	562,779	18,965	581,744
	2007	3,088	6,870	555,599	43,325	598,924
	2008	3,099	5,360	525,974	67,710	593,684
Karaman	2002	1,290	1,823	61,550	24,000	85,550
	2007	2,747	2,191	86,940	20,119	107,059
	2008	2,828	3,105	92,710	15,300	108,010
Antalya	2002	8,460	3,033	210,997	21,713	232,710
	2007	8,347	4,141	197,400	24,535	221,935
	2008	8,717	4,063	199,750	33,785	233,535
Isparta	2002	3,990	1,929	259,825	33,310	293,135
	2007	3,407	2,029	214,620	23,630	238,250
	2008	2,810	3,104	205,227	23,970	229,197
Mersin	2002	2,920	5,194	212,111	22,725	234,836
	2007	6,074	6,835	267,013	37,319	304,332
	2008	5,164	5,504	240,563	48,129	288,692
Elazig	2002	6,280	3,103	179,900	63,937	243,837
	2007	6,160	2,453	183,943	46,339	230,282

	2008	4,560	3,395	145,810	19,445	165,255
TURKEY TOTAL	**2008**	**109,130**	**52,774**	**3,430,219**	**1,279,101**	**4,709,320**

Source: TUIK

Post revised MY 2008/09 trade data in PSD table. There are many claims of illegal almond shipments entering across Turkey's eastern border. Not only almond but also walnut and pistachio enter illegally. At the moment it is very difficult to guess the amount of illegal tree nuts entering Turkey.

Consumption:

Trade:

Inshell almond imports doubled in MY 2008 and reached 11,100 MT, and shelled almond exports rose. There is a steady increase in shelling and processing operations in Turkey.

Table 3: Almond importation and exportation (MY)

Turkey: Almond Foreign Trade					
PRODUCT	**YEAR**	**IMPORT ($)**	**IMPORT (KG)**	**EXPORT ($)**	**EXPORT (KG)**
Almonds: Shelled Other Than Bitter	2006	8,157,716	1,235,617	12,405,196	971,125
	2007	18,103,413	2,679,688	26,617,547	2,011,852
	2008	20,898,640	3,084,350	38,871,313	3,547,090
Almonds: In Shell Other Than Bitter	2006	9,731,096	3,135,272	48,596	18,918
	2007	17,631,267	5,711,497	59,096	26,761
	2008	35,524,260	11,630,978	75,211	4,027
Roasted Almonds In Packing of A Net Content Of 1 Kg Or Less	2006	305	25	239,450	18,061
	2007	19,094	1,394	291,750	22,009
	2008	0	0	433,363	38,065
Roasted Almonds In Packing of A Net Content Exceeding Kg	2006	2,045,658	256,725	42,722	3,242
	2007	759,384	102,727	668,371	153,059
	2008	987,908	165,512	570,694	166,358
TOTAL	2006	19,934,775	--	12,735,964	--
	2007	36,513,158	--	27,636,764	--
	2008	57,410,808	--	39,950,581	--

Source: TUIK

MY 2008 almond exports were announced by the Istanbul Exporters Union at 3,850 MT which is 69.1% higher than MY 2007.

The United States is the major supplier of inshell almonds. Inshell imports from the United States has nearly tripled from MY 2007 to MY 2008.

Table 4: Major Almond Suppliers for Turkey based on CY

Turkey: Almond Imports by origin (Calendar year basis, MT and USD)							
	Origin	2006		2007		2008	
		Value	Quantity	Value	Quantity	Value	Quantity
Almonds: In Shell Other Than Bitter	World	4,264,900	1,714	13,020,202	4,207	27,918,507	9,029
	United States	4,264,900	1,714	12,980,371	4,195	27,087,222	8,757
	Syria	0	0	0	0	443,528	143
	Chile	0	0	0	0	194,518	66
	Afghanistan	0	0	0	0	151,265	50
Almonds: Shelled Other Than Bitter	World	7,939,416	1,540	7,144,647	1,037	20,750,157	3,085
	United States	7,771,957	1,501	6,471,870	938	18,832,012	2,795
	Spain	0	0	532,299	79	1,118,507	166
	Chile	0	0	0	0	275,566	41
	Australia	0	0	0	0	243,370	36
	Iran	0	0	0	0	142,233	22

Inshell almond imports in January-June, 2009 reached 6,528 MT. Almond imports during the domestic harvest season (September 1 to November 1) are unofficially restricted.

Table 5: Almond imports and exports (MY)

Turkey: Almond Imports, January-*June*, 2009			
	Origin	2009 (January-*July*)	
		US$	Quantity (MT) Actual weight
Almond (In shell)	World	20,014,141	6,528
	U.S	19,270,223	6,284
	Chile	330,011	109
	Australia	295,176	97
	Afghanistan	66,496	22
	Bulgaria	52,235	16
Almond (Shelled)	World	13,596,838	2,014
	U.S	11,625,387	1,735
	Bosnia Herzegovina	1,105,291	152
	Spain	703,140	102
	Chile	163,020	24

Production, Supply and Demand Data Statistics:

PSD Table for Almonds

Almonds, Shelled Basis						
PSD, Almonds, Shelled Basis	2007 Revision		2008 Estimates		2009 Forecast	
	2007/2008		2008/2009		2009/2010	
	Market Year Begin: Sep 2007		Market Year Begin: Sep 2008		Market Year Begin: Sep 2009	
	USDA Official Data	Old Post	USDA Official Data	Annual Data Displayed	USDA Official Data	Annual Data Displayed

			Data			Data			Data
Area Planted (ha)	0	0	0	0	0	0	0	0	0
Area Harvested (ha)	0	0	0	0	0	0	0	0	0
Bearing Trees (1000 trees)	3,300	3,300	3,300	3,500	3,500	3,500	3,500	3,500	3,500
Non-Bearing Trees (1000 trees)	800	800	800	850	850	850	850	850	850
Total Trees (1000 trees)	4,100	4,100	4,100	4,350	4,350	4,350	4,350	4,350	4,350
Beginning Stocks (MT)	2,300	2,300	2,300	2,300	4,363	2,792	2,800	6,903	2,166
Production (MT)	15,500	15,500	16,000	16,000	16,000	16,000	16,000	16,000	16,000
Imports (MT)	7,400	4,583	4,686	14,000	6,400	7,126	20,000	5,000	8,000
Total Supply (MT)	25,200	22,383	22,986	32,300	26,763	25,918	38,800	27,903	26,166
Exports (MT)	2,100	2,020	2,194	3,500	3,360	3,752	3,500	3,500	3,900
Domestic Consumption (MT)	20,800	16,000	18,000	26,000	16,500	20,000	32,000	16,800	20,000
Ending Stocks	2,300	4,363	2,792	2,800	6,903	2,166	3,300	7,603	2,266
Total Distribution (MT)	25,200	22,383	22,986	32,300	26,763	25,918	38,800	27,903	26,166

PSD production estimates are based on shelled nuts with a conversion factor of 1:3